

Canada's Clean Electricity Supply Challenge

CCRE Energy Roundtable, May 2026

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Canada's National Electricity Strategy refers to demand doubling

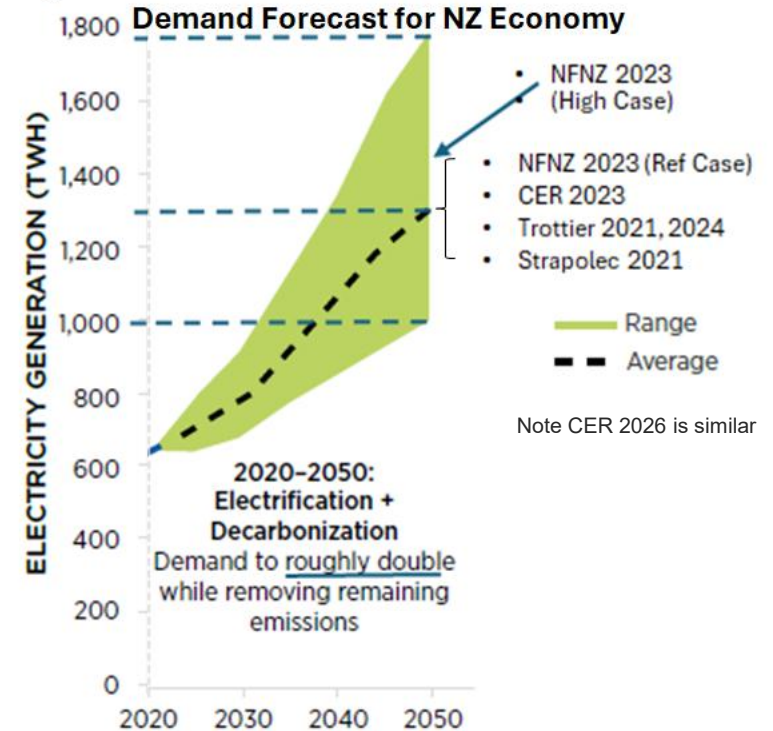
Electricity to decarbonize the economy (*The What*) is well understood

Electricity implications of economic growth and energy security are still in flux

Timelines over which demand will emerge (*The When*) NOT understood

Question: *How important is it to understand the "When"*

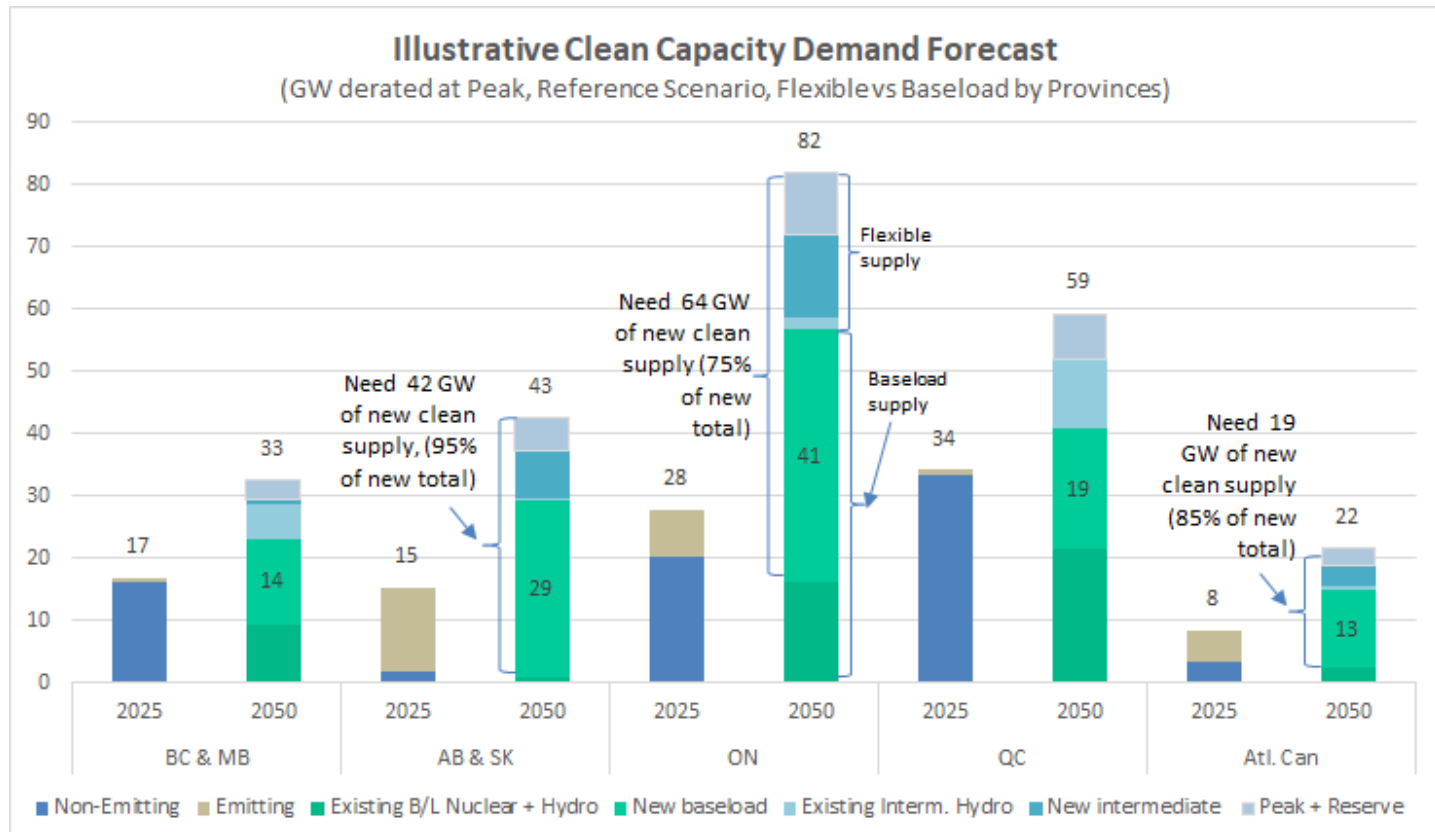
Figure 1 – CEAC and CNA Evaluated Electrification



Source: CEAC Final Report, May 2024, Powering Canada: A Blueprint for Success, Canada Electricity Advisory Council; CNA, Outlook for Nuclear in Canada, 2025; Strapolec Analysis

Complication: Demand growth varies by province

As does clean supply transition



CNA, Outlook for Nuclear in Canada, 2025; Strapolec Analysis

Ontario supply/demand planning example:

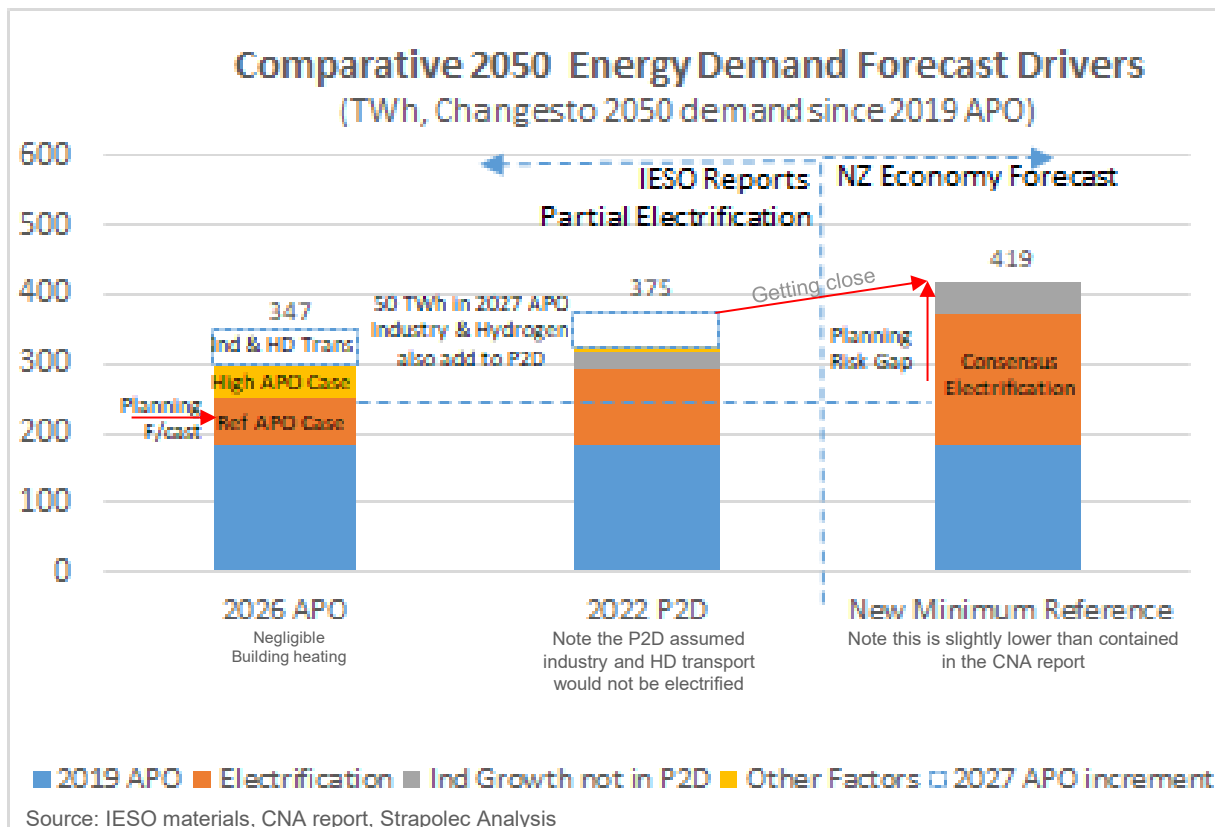
IESO understands electrification → Policy driver timing is less clear

IESO's procurement planning basis is the APO reference case → 65% growth

- Defers electrification assumptions by excluding:
 - High case EV adoption and industrial growth
 - Industrial and heavy-duty transport
 - Most building heating

- Economic growth has near term focus
 - Other factors TBD
 - ◆ Ring of Fire, High Speed Rail, fast economic growth, etc

Question: *How material are the timing implications on resource planning?*



Development timelines warrant contingencies for uncertainties

Jurisdictions with power will win the economic growth race

Issue: Demand risks are grid multiples, both near/long term: Challenge: Infrastructure takes decades to define and build

- Will need more gas in 2038; Bruce C need questioned?
- Demand risks may not be easily mitigated

